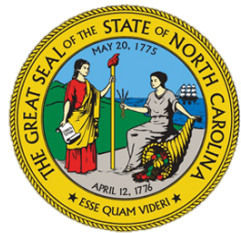


# **North Carolina Immunization Registry (NCIR)**

## **Reminder Recall**

## **User Guide**

Last Updated: January 14, 2022



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**



# Overview

## What is the North Carolina Immunization Registry (NCIR)?

The **North Carolina Immunization Registry (NCIR)** is a secure, web-based clinical tool which is the official source for North Carolina immunization information. Immunization providers may access all recorded immunizations administered in North Carolina, regardless of where the immunizations were given.

The purpose of NCIR is:

- To give patients, parents, health care providers, schools and child care facilities timely access to complete, accurate and relevant immunization data;
- To assist in the evaluation of a child's immunization status and identify children who need (or are past due for) immunizations;
- To assist communities in assessing their immunization coverage and identifying areas of under-immunization.

**Now, let's get started!**

# Request Reminder

# Reminder

---

## Request Reminder

- Used to generate reports, letters, address labels, or a client listing for clients “active” in the organization.
- Unlike the Assessment report, the Request Reminder reports will show client specific information.

## Reminder Recall Report will help to...

- Determine which clients are not up to date with their immunizations.
- Provide a fast way to run a report with all the contact information for those clients that need to come back in.
- Improve immunization rates because you will be able to keep your clients up to date.



# How to Run the Request Reminder Report

Production Region 7.8.1

## General

system user manual

## Maintenance

manage users  
manage sites  
manage clinicians  
manage physicians  
manage schedules  
manage schools  
mass vax definition

## Inventory

manage inventory  
manage orders  
manage transfers  
shipping documents  
request transaction sum  
request vaccine usage  
request wasted/expired  
inventory report

## Clients

manage client  
mass vax grid entry

## Immunizations

manage immunizations

## Reports

request reminder  
check reminder status  
request callback  
request new client form  
request casa extract  
check request status  
request vfc reports  
check vfc status  
assessment report  
check assessment

Click on the request reminder link under the *Reports* section.

# How to Run the Request Reminder Report

## Private Providers

**Reminder/Recall Request**

**Select the Vaccine Group(s) ...**

☐ Use All Vaccine Groups  
☒ Use Vaccine Groups Selected

Adeno Anthrax Add > < Remove DTP/aP HepB Hib

**Select the School & Primary Care Provider ...**

School  Provider - PCP

**Enter Additional Demographic Criteria ...**

City  Zip Code  County

**Enter the Date Criteria ...**

\*Birth Date Range From  To   
Target Date Range From  To   
Weeks Since Last Notice  NOTE: If Target Date is blank, today's date will be used.  
Exclude clients more than  Month(s) Overdue  
Exclude from ☐ Today's Date ☐ Target From Date

**Specify How to Sort the Report Data ...**

Sort 1<sup>st</sup> By Last Name Ascending Sort 3<sup>rd</sup> By    
Sort 2<sup>nd</sup> By First Name Ascending Sort 4<sup>th</sup> By

**Generate** Cancel

NOTE: Fields marked with an asterisk \* are required.

Select vaccine group. The default is set to required vaccines.  
You can add or remove additional vaccines as necessary.

Type in your birth date range.

Click **Generate** when done.

# How to Run the Request Reminder Report

## Local Health Department

**Reminder/Recall Request**

**Select Client Population ...**

☒ Clients Associated with ALAMANCE COUNTY HEALTH DEPARTMENT

☐ Clients Residing in Selected Counties below

☐ Clients within ALAMANCE COUNTY HEALTH DEPARTMENT or Residing in Selected Counties

Available Counties:  Add > < Remove

Selected Counties: Alamance, Hyde

NOTE: Fields marked with an asterisk - are required.

**Select the Vaccine Group(s) ...**

☐ Use All Vaccine Groups

☒ Use Vaccine Groups Selected

Adeno, Anthrax, Add > < Remove

MMR, Polio, Varicella

**Select the School & Primary Care Provider ...**

School:  Provider - PCP:

**Enter Additional Demographic Criteria ...**

City:  Zip Code:  County:

**Enter the Date Criteria ...**

**Birth Date Range** From:  To:

Target Date Range From:  To:

Weeks Since Last Notice:

Exclude clients more than  Month(s) Overdue

Exclude from: ☒ Today's Date ☐ Target From Date

NOTE: If Target Date is blank, today's date will be used.

**Specify How to Sort the Report Data ...**

Sort 1<sup>st</sup> By: Last Name, Ascending

Sort 2<sup>nd</sup> By: First Name, Ascending

Sort 3<sup>rd</sup> By:

Sort 4<sup>th</sup> By:

Generate Cancel

**Step 1.** Select the Client Population.

**Step 2.** Select vaccine group. The default is set to required vaccines. You can add or remove additional vaccines as necessary.

**Step 3.** Type in your birth date range.

**Step 4.** Select Generate.



# How to Run the Request Reminder Report

## Status Report

Reminder Request Status						
Started	Completed	Status	Clients	Eligible	Birth From	Birth To
07/27/2009 04:32 PM		QUEUE			01/02/2006	01/01/2007

Refresh

Cancel

Reminder Output Status
No Reminder Outputs Logged

Stage 1: Click Refresh.

Reminder Request Status						
Started	Completed	Status	Clients	Eligible	Birth From	Birth To
11/19/2007 12:33 PM		10 %			10/01/2005	10/01/2007

Refresh

Cancel

Reminder Output Status
No Reminder Outputs Logged

Stage 2: Loading.

Reminder Request Status						
Started	Completed	Status	Clients	Eligible	Birth From	Birth To
<a href="#">07/27/2009 04:32 PM</a>	07/27/2009 04:33 PM	100 %	4	2	01/02/2006	01/01/2007

Refresh

Cancel

Reminder Output Status
No Reminder Outputs Logged

Stage 3: Completed.

# How to Run the Request Reminder Report

## Request Reminder Process Summary

Reminder Request Process Summary		
Step	Criteria Evaluated at this Step	Clients
1	Clients that are <b>active or inactive</b> for <i>SIX FORKS DEPOT</i> .	36
2	Clients that are <b>active</b> for <i>SIX FORKS DEPOT</i> .	32
3	Clients from Step 2 that are <b>born between 01/02/2006 and 01/01/2007</b> .	8
4	Clients from Step 3 that meet the following criteria: <ul style="list-style-type: none"><li>• <b>County</b> is not specified;</li><li>• <b>School</b> is not specified;</li><li>• <b>Provider</b> is not specified;</li><li>• <b>Weeks Since Last Notice</b> is not specified.</li></ul>	8
5	Clients from Step 4 that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"><li>• Clients that are <b>Recommended or Overdue</b> for one or more vaccinations <b>as of 07/27/2009</b>;</li><li>• Use the following <b>vaccine groups: DTP/aP, HepB, Hib, MMR and Polio</b>;</li><li>• Use for all clients.</li><li>• <b>Exclude Overdue Reminders</b> is not specified</li></ul>	4
6	Clients from Step 5 that meet the following criteria. <ul style="list-style-type: none"><li>• Have one or more <b>responsible persons</b>;</li><li>• At least one responsible person <b>receives notices</b>;</li><li>• <b>City</b> is not specified</li><li>• <b>Zip Code</b> is not specified</li></ul>	2
	<b>Total Number of Clients Eligible for Reminder</b>	<b>2</b>
7	Clients from Step 5 that are omitted from Step 6: <a href="#">Omitted Clients</a>	(2)

# How to Run the Request Reminder Report

## Request Reminder Process Summary: Part 1

Reminder Request Process Summary		
Step	Criteria Evaluated at this Step	Clients
1	Clients that are <b>active or inactive</b> for <i>SIX FORKS DEPOT</i> .	36
2	Clients that are <b>active</b> for <i>SIX FORKS DEPOT</i> .	32
3	Clients from Step 2 that are <b>born between 01/02/2006 and 01/01/2007</b> .	8
4	Clients from Step 3 that meet the following criteria: <ul style="list-style-type: none"><li>• <b>County</b> is not specified;</li><li>• <b>School</b> is not specified;</li><li>• <b>Provider</b> is not specified;</li><li>• <b>Weeks Since Last Notice</b> is not specified.</li></ul>	8
5	Clients from Step 4 that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"><li>• Clients that are <b>Recommended or Overdue</b> for one or more vaccinations <b>as of 07/27/2009</b>;</li><li>• Use the following <b>vaccine groups</b>: <b>DTP/aP, HepB, Hib, MMR and Polio</b>;</li><li>• Use for all clients.</li><li>• <b>Exclude Overdue Reminders</b> is not specified</li></ul>	4
6	Clients from Step 5 that meet the following criteria: <ul style="list-style-type: none"><li>• Have one or more <b>responsible persons</b>;</li><li>• At least one responsible person <b>receives notices</b>;</li><li>• <b>City</b> is not specified</li><li>• <b>Zip Code</b> is not specified</li></ul>	2
<b>Total Number of Clients Eligible for Reminder</b>		
7	Clients from Step 5 that are omitted from Step 6: <a href="#">Omitted Clients</a>	

Click on **Omitted Clients**.

Reminder Request Status						
Started	Completed	Status	Clients	Eligible	Birth From	Birth To
<a href="#">07/27/2009 04:32 PM</a>	07/27/2009 04:33 PM	100 %	4	2	01/02/2006	01/01/2007

Refresh

Cancel

Then, Click  
**Refresh**.

When your report is ready click on  
the '**Omitted Clients**' link.

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
<a href="#">Omitted Clients</a>	Omitted Clients	07/27/2009 04:49 PM	07/27/2009 04:49 PM	07/27/2009 04:49 PM	Ready

# Request Reminder Report: Omitted Clients

## How do I fix the Omitted Clients?

Take the omitted list and the client query list and “clean up” those records as much as possible.

1. Print the omitted client list
2. Go back to Manage Client
3. Add the responsible person information

Report run on: 24 July 2009

**Reminder / Recall - Incomplete Address**  
**Omitted Clients**  
**SIX FORKS DEPOT**

Page 1 of 1

Client Name (L, F M)	Birth Date:	Chart Number:
TEST, ANEW	12/31/2006	
TEST, TEST TEST	01/21/2006	5
ZEROFOURSEVEN, CRONE	05/04/2007	

Notice this client has a  
chart number.

# Request Reminder Report: Omitted Clients

The screenshot shows the mciR web application interface. At the top, there is a navigation bar with links: home, change password, logout, help desk, and a lightbulb icon. Below this, a yellow banner displays the user information: organization SIX FORKS DEPOT, user Leah Quinn, and role Administrator. The main content area is titled "Client Search Criteria" and contains three search sections: "Search by Client", "Search by Chart Number", and "Search by Mother's Maiden Name". The "Search by Client" section has fields for Last Name, First Name, Birth Date, Gender (M, F, Unknown), Mother's Maiden Last, and Mother's First Name. The "Search by Chart Number" section has a field for Chart Number. The "Search by Mother's Maiden Name" section has fields for Mother's Maiden Last, Mother's First Name, and Client's Birth Date. A "Find" button is located to the right of the "Search by Client" section. A red box highlights the "Last Name", "First Name", and "Birth Date" fields in the "Search by Client" section. A yellow callout box points to the "Find" button.

Production Region 7.6.5.1

**General**  
system user manual

**Maintenance**  
manage users  
manage sites  
manage clinicians  
manage schedules

**Inventory**  
manage inventory  
manage orders  
manage transfers  
shipping documents  
request transaction sum  
request vaccine usage  
request wasted/expired  
inventory report

**Client Search Criteria**

**Search by Client**

\*Last Name  Gender ☐ M ☐ F ☐ Unknown

\*First Name  Mother's Maiden Last

\*Birth Date  Mother's First Name

**Search by Chart Number**

\*Chart Number

**Search by Mother's Maiden Name**

\*Mother's Maiden Last  \*Client's Birth Date

\*Mother's First Name

NOTE: Fields marked with an asterisk \* are required.

Search by client, chart numbers or mother's maiden name. Then, select "Find".

Report run on: 24 July 2009

## Reminder / Recall - Incomplete Address Omitted Clients SIX FORKS DEPOT

Page 1 of 1

Go back to "Manage Client". Take the first client on your "Omitted Clients" list and enter the info into the Client search screen.

Client Name (L, F M)	Birth Date:	Chart Number:
TEST, ANEW	12/31/2006	
TEST, TEST TEST	01/21/2006	5
ZEROFOURSEVEN, CRONE	05/04/2007	

# Request Reminder Report: Omitted Clients

**Personal Information - Client ID: 10865377**

\*Last Name

TEST

\*First Name

ANEW

Middle Name

\*Mother's Maiden Last

\*Mother's First Name

SSN

 -  -

Gender

☐ M ☒ F ☐ Unknown

\*Birth Date

12/31/2006

\*County of Residence

Out of State

Last Notice

07/23/2009

Save

History/Recommend

Reports

Cancel

Last Updated by: NORTH CAROLINA IMMUNIZATION REGISTRY on 07/15/2009

Client Information

Responsible Person(s)

Click on the Responsible Person(s) Tab.

Eligibility

Verification Date:

Eligibility as reported by Responsible Person:

Organization Specific Data

Chart #

Status

Active

Client Information

Responsible Person(s)

Client Comment(s)

**Responsible Person Listing**

Select	Last Name	First Name	Relationship	City	Notices	Primary
<input checked="" type="radio"/>	TEST	ANEW	Self	BROOKFIELD	No	Yes
<input type="radio"/>						
<input type="radio"/>						
<input type="radio"/>						

New

Copy

Delete

**Details for Responsible Person: ANEW TEST (Last Updated: 07/15/2009 09:07:36 PM)**

# Request Reminder Report: Responsible Person Information

Last Updated by: NORTH CAROLINA IMMUNIZATION REGISTRY on 07/15/2009

Client Information Responsible Person(s) Client Comment(s)

## Responsible Person Listing

Select	Last Name	First Name	Relationship	City	Notices	Primary
<input checked="" type="radio"/>	TEST	ANEW	Self	BROOKFIELD	No	Yes
<input type="radio"/>						
<input type="radio"/>						

"Notice" informs providers if reminder letter will be generated.

Note that the ✓ has been removed from the "Notices?" box.

## Details for Responsible Person: ANEW TEST (Last Updated: 07/15/2009 09:07:36 PM)

Last Name	TEST	Street Address	1872 WALWAUTOSA WAY		
First Name	ANEW	Other Address			
Middle Name		P.O. Box			
Relation	Self	City	BROOKFIELD		
Telephone		State	WI	Zip	53810
Extension		Language	ENGLISH		
E-Mail		Notices?	<input type="checkbox"/>	Primary?	<input checked="" type="checkbox"/>

Note the last updated information.

NOTE: Fields marked with an asterisk \* are required.



# Request Reminder Report

Reminder Request Status							Refresh
Started	Completed	Status	Clients	Eligible	Birth From	Birth To	Cancel
<a href="#">07/27/2009 04:32 PM</a>	07/27/2009 04:33 PM	100 %	4	2	01/02/2006	01/01/2007	

Click the report link which is underlined in blue.

Reminder Request Output Options		
Output	Description	Additional Input
<a href="#">Client Query Listing</a>	A list of clients eligible for reminder based on the report criteria (in .pdf format). Excludes omitted clients.	Report Name <input type="text"/>
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text"/> Please make sure to bring any insurance information on your next visit Phone # <input type="text"/> 919-707-5550
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Please make sure to bring any insurance information on your next visit Phone # <input type="text"/> 919-707-5550
<a href="#">Mailing Labels</a>	Avery Mailing Labels.	Report Name <input type="text"/>
<a href="#">Client Extract</a>	A .txt file of clients eligible for reminder based on the report criteria. Includes omitted clients.	Report Name <input type="text"/>

NOTE: Fields marked with an asterisk \* are required.

Type in the name of the report.



# Request Reminder Report

Production Region 7.8.1

.....

## System Monitoring

check report status

## General

system user manual

## Organizations

switch organizations

manage organizations

manage org groups

switch org & role

## Maintenance

manage users

manage schools

manage physicians

manage sites

manage clinicians

avstats

manage schedules

mass vax definition

mass vax visibility

## Inventory

manage inventory

manage orders

manage transfers

shipping documents

request transaction sum

request vaccine usage

request wasted/expired

manual orders

inventory report

vaccine accountability

## Immunizations

manage immunizations

## Clients

manage client

merge clients

mass vax grid entry

## Reports

request reminder

check reminder status

request callback

## Reminder Request Status

Started	Completed	Status	Clients	Eligible	Birth From	Birth To
<a href="#">07/27/2009 04:32 PM</a>	07/27/2009 04:33 PM	100 %	4	2	01/02/2006	01/01/2007

Refresh

Cancel

## Reminder Output Status

Name	Type	Requested	Started	Completed	Status
<a href="#">24-35 mos</a>	Client List	07/27/2009 05:14 PM	07/27/2009 05:14 PM	07/27/2009 05:14 PM	Ready

Report Link

# Request Reminder Report

Report run on: 07/20/2009 03:30 PM Client Query Listing Page 1 of 4

Client Name (F.M.L.)	Chart Number	Phone Number	Address	City/State/ZIP
MARIA BOCK - 06/19/2006	661		425 LAKE MIST CT	CHARLOTTE, NC 28277
<b>Vaccine</b>	<b>Recmd Day</b>	<b>Immunization Date:</b>		
DTaP	09/29/2007	1) 09/05/2006 2) 10/31/2006 3) 01/23/2007		
HepA	04/13/2008	1) 10/13/2007		
HepB	Complete	1) 06/29/2006 2) 09/05/2006 3) 01/23/2007		
Hib	07/23/2007	1) 09/05/2006 2) 10/31/2006 3) 01/23/2007		
Influenza	02/14/2008	1) 12/29/2006 2) 02/14/2007		
MMR	06/29/2007			
Meningo	06/29/2007			
PneumoConjugate	06/29/2007	1) 09/05/2006 2) 10/31/2006 3) 01/23/2007		
Polio	06/29/2010	1) 09/05/2006 2) 10/31/2006 3) 01/23/2007		
Varicella	06/29/2007			
MARIA BOCK - 06/19/2006	662		425 LAKE MIST CT	CHARLOTTE, NC 28277
<b>Vaccine</b>	<b>Recmd Day</b>	<b>Immunization Date:</b>		
DTaP	06/06/2009	1) 10/31/2006 2) 01/23/2007 3) 12/06/2008		
HepA	Complete	1) 10/13/2007 2) 07/23/2008		
HepB	02/23/2007	1) 01/23/2007		
Hib	Complete	1) 10/31/2006 2) 01/23/2007 3) 12/06/2008		
Influenza	02/14/2008	1) 12/29/2006 2) 02/14/2007		
MMR	06/29/2010	1) 07/06/2007		
Meningo	06/29/2007			
PneumoConjugate	Complete	1) 10/31/2006 2) 01/23/2007 3) 12/06/2008		
Polio	06/29/2010	1) 10/31/2006 2) 01/23/2007 3) 12/06/2008		
Varicella	06/29/2010	1) 07/06/2007		
MINDY HALL - 07/30/2006	657		123 ANNA LANE	CHARLOTTE, NC 28273
<b>Vaccine</b>	<b>Recmd Day</b>	<b>Immunization Date:</b>		
DTaP	06/10/2009	1) 11/30/2006 2) 05/11/2007 3) 07/31/2007 4) 12/10/2008 (OTV)		
HepA	Complete	1) 07/31/2007 2) 07/10/2009		
HepB	Complete	1) 07/30/2006 2) 05/11/2007 3) 07/31/2007		
Hib	Complete	1) 11/30/2006 2) 05/11/2007 3) 07/31/2007		
Influenza	01/30/2007			
MMR	07/30/2010	1) 07/31/2007		
Meningo	07/30/2007			
PneumoConjugate	Complete	1) 05/11/2007 2) 07/31/2007 3) 07/10/2009		
Polio	07/30/2010	1) 11/30/2006 2) 05/11/2007 3) 07/31/2007 4) 12/10/2008 (OTV)		
Varicella	07/30/2010	1) 07/31/2007		

## Questions to Consider:

- Are there any active duplicate clients under my organization?
- Have all doses administered been keyed into NCIR?
- Have keyed doses been entered correctly?
- Are there clients that need to be made inactive?

# Request Reminder Report: Client Query Listing

 Back

PEGGY PERSON - 08/15/1992 RPXX2 117 BULL RUN ITHACA, WI 53810  
117 BULL RUN ITHACA, WI 53810

Vaccine	Recmd Day	Immunization Dates
---------	-----------	--------------------

HepA	08/15/1993	
HepB	08/15/1992	
Influenza	Contraindicated	
MMR	Contraindicated	
Meningo	08/15/2003	
Polio	03/01/1995	1) 01/01/1995
Td	02/01/2008	1) 01/01/2002 (NV) 2) 01/01/2008
Tdap/Pertussis	Complete	1) 01/01/2008
Varicella	Contraindicated	

Look for "blank" records.

Look for not valid (NV) shots.

# Request Reminder Report: Client Query Listing

Report run on: 07/27/2009 05:14 PM

## Client Query Listing

Page 1 of 1

Client Name (F M L)	Chart Number	Phone Number	Address	City/State/ZIP																																	
TEST ME - 07/01/2008	9	(919) 707-5580 (919) 707-5580	5601 six forks road 5601 six forks road	RALEIGH, NC 27609 RALEIGH, NC 27609 NC NC																																	
<table> <tr> <th>Vaccine</th> <th>Recmd Day</th> <th>Immunization Dates</th> </tr> <tr> <td>DTP/aP</td> <td>10/01/2009</td> <td>1) 09/09/2008 2) 11/19/2008 3) 01/09/2009</td> </tr> <tr> <td>HepA</td> <td>01/06/2010</td> <td>1) 07/06/2009</td> </tr> <tr> <td>HepB</td> <td>Contraindicated</td> <td>1) 09/22/2008</td> </tr> <tr> <td>Hib</td> <td>08/03/2009</td> <td>1) 09/09/2008 2) 11/19/2008 3) 02/03/2009</td> </tr> <tr> <td>Influenza</td> <td>04/03/2010</td> <td>1) 02/03/2009 2) 04/03/2009</td> </tr> <tr> <td>MMR</td> <td>07/01/2009</td> <td></td> </tr> <tr> <td>Meningo</td> <td>07/01/2019</td> <td></td> </tr> <tr> <td>PneumoConjugate</td> <td>09/01/2008</td> <td></td> </tr> <tr> <td>Polio</td> <td>07/01/2012</td> <td>1) 09/09/2008 2) 11/19/2008 3) 02/03/2009</td> </tr> <tr> <td>Varicella</td> <td>07/01/2009</td> <td></td> </tr> </table>					Vaccine	Recmd Day	Immunization Dates	DTP/aP	10/01/2009	1) 09/09/2008 2) 11/19/2008 3) 01/09/2009	HepA	01/06/2010	1) 07/06/2009	HepB	Contraindicated	1) 09/22/2008	Hib	08/03/2009	1) 09/09/2008 2) 11/19/2008 3) 02/03/2009	Influenza	04/03/2010	1) 02/03/2009 2) 04/03/2009	MMR	07/01/2009		Meningo	07/01/2019		PneumoConjugate	09/01/2008		Polio	07/01/2012	1) 09/09/2008 2) 11/19/2008 3) 02/03/2009	Varicella	07/01/2009	
Vaccine	Recmd Day	Immunization Dates																																			
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Polio	07/01/2012	1) 09/09/2008 2) 11/19/2008 3) 02/03/2009																																			
Varicella	07/01/2009																																				

TESTER TESTDELETE - 01/10/2006	(919) 707-5580	5601 six forks road	RALEIGH, NC 27609																																	
<table> <tr> <th>Vaccine</th> <th>Recmd Day</th> <th>Immunization Dates</th> </tr> <tr> <td>DTP/aP</td> <td>03/10/2006</td> <td></td> </tr> <tr> <td>HepA</td> <td>01/10/2007</td> <td></td> </tr> <tr> <td>HepB</td> <td>01/10/2006</td> <td></td> </tr> <tr> <td>Hib</td> <td>03/10/2006</td> <td></td> </tr> <tr> <td>Influenza</td> <td>11/10/2009</td> <td>1) 11/12/2007 2) 12/17/2007 3) 11/10/2008</td> </tr> <tr> <td>MMR</td> <td>01/10/2007</td> <td></td> </tr> <tr> <td>Meningo</td> <td>01/10/2017</td> <td></td> </tr> <tr> <td>PneumoConjugate</td> <td>03/10/2006</td> <td></td> </tr> <tr> <td>Polio</td> <td>03/10/2006</td> <td></td> </tr> <tr> <td>Varicella</td> <td>01/10/2007</td> <td></td> </tr> </table>				Vaccine	Recmd Day	Immunization Dates	DTP/aP	03/10/2006		HepA	01/10/2007		HepB	01/10/2006		Hib	03/10/2006		Influenza	11/10/2009	1) 11/12/2007 2) 12/17/2007 3) 11/10/2008	MMR	01/10/2007		Meningo	01/10/2017		PneumoConjugate	03/10/2006		Polio	03/10/2006		Varicella	01/10/2007	
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Meningo	01/10/2017																																			
PneumoConjugate	03/10/2006																																			
Polio	03/10/2006																																			
Varicella	01/10/2007																																			

Enter historical doses.

Look for duplicate addresses.

Enter historical doses.

# Request Reminder Report: Client Query Listing

**Don't forget to report duplicates to the NCIR Help Desk!**

CHRISTOPHE MICHAELS - 04/06/2006			111 CYPRESS ST	CHARLOTTE, NC 28227
Vaccine	Recmd Day	Immunization Dates		
DTP/aP	06/06/2006			
HepA	04/06/2007			
HepB	04/06/2006			
Hib	06/06/2006			
Influenza	10/06/2006			
MMR	04/06/2007			
Meningo	04/06/2017			
PneumoConjugate	06/06/2006			
Polio	06/06/2006			
Varicella	04/06/2007			

CHRISTOPHER MICHAELS - 04/06/2006			111 CYPRESS ST	CHARLOTTE, NC 28227
Vaccine	Recmd Day	Immunization Dates		
DTP/aP	06/06/2006			
HepA	04/06/2007			
HepB	04/06/2006			
Hib	06/06/2006			
Influenza	10/06/2006			
MMR	04/06/2007			
Meningo	04/06/2017			
PneumoConjugate	06/06/2006			
Polio	06/06/2006			
Varicella	04/06/2007			

# Request Reminder Report: Client Query Listing

## Client Evaluation:

- Responsible Persons: NC address and TX address
- No doses entered since 2006
- Received confirmation from parent that patient now lives in Texas
- Moved or Gone Elsewhere (MOGE)

BRITTANYA O'CAMPO - 09/16/2006 660			(651) 125-1252	89680 CAMPUS AVE 8756 YELLOW ROSE LANE	CHARLOTTE, NC 28214 DALLAS, TX 77714
Vaccine	Recmd Day	Immunization Dates			
DTP/aP	02/04/2007	1) 12/04/2006			
HepA	09/16/2007				
HepB	03/16/2007	1) 09/20/2006 2) 12/04/2006			
Hib	02/04/2007	1) 12/04/2006			
Influenza	03/16/2007				
MMR	09/16/2007				
Meningo	09/16/2017				
PneumoConjugate	02/04/2007	1) 12/04/2006			
Polio	02/04/2007	1) 12/04/2006			
Rotavirus	Max Age Exceeded	1) 12/04/2006			
Varicella	09/16/2007				

# Request Reminder Report: Client Query Listing

**Personal Information - Client ID: 5999660**

\*Last Name

O'CAMPO

\*First Name

BRITTANYA

Middle Name

\*Mother's Maiden Last

O'CAMPO

\*Mother's First Name

MAMA

SSN (On File)

Gender

☐ M ☐ F ☒ Unknown

\*Birth Date

09/16/2006

\*County of Residence

Mecklenburg

Last Notice

07/21/2009

Save

History/Recommend

Reports

Cancel

NOTE: Fields marked with an asterisk \* are required.

Last Updated by: NORTH CAROLINA IMMUNIZATION REGISTRY on 07/21/2009

Client Information

Responsible Person(s)

Client Comment(s)

Eligibility

Verification Date:

Eligibility as reported by Responsible Person:

Provider Organization Specific Data

Chart #


Status

Active

\*Tracking Schedule

ACIP

Change status to  
**"Inactive"** to  
inactivate client.

 NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

23

# Request Reminder Report: Unable to locate

---

## Inactivate client when the below three are met:

1. The client has not been seen by your office in the last 12 months
2. All available telephone numbers are no longer valid (disconnected or family no longer associated with number)
3. A postcard and/or letter has been returned as undeliverable and no other address information is known

## Run Request Reminder!

Any time you edit client information (i.e. demographics, shot info.) the Request Reminder report must be run again in order to reflect the changes you have made.



# Request Reminder Report - How To Generate Reminder Letters

Production Region 7.8.1

## General

system user manual

## Maintenance

manage users  
manage sites  
manage clinicians  
manage physicians  
manage schedules  
manage schools  
manage vax definition

## Inventory

manage inventory  
manage orders  
manage transfers  
shipping documents  
request transaction sum  
request vaccine usage  
request wasted/expired  
inventory report

## Clients

manage client  
mass vax grid entry

## Immunizations

manage immunizations

## Reports

request reminder  
check reminder status  
request callback  
request new client form  
request casa extract  
check request status  
request vfc reports  
check vfc status  
assessment report  
check assessment

### Reminder Request Status

Started	Completed	Status	Clients	Eligible	Birth From	Birth To
<a href="#">07/27/2009 04:32 PM</a>	07/27/2009 04:33 PM	100 %	4	2	01/02/2006	01/01/2007

Refresh

Cancel

### Reminder Request Output Options

Output	Description	Additional Input
<a href="#">Client Query Listing</a>	A list of clients eligible for reminder based on the report criteria (in .pdf format). Excludes omitted clients.	Report Name <input type="text"/>
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text" value="Please make sure to bring any insurance information on your next visit"/> Phone # <input type="text" value="919-707-5550"/>
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text" value="Please make sure to bring any insurance information on your next visit"/> Phone # <input type="text" value="919-707-5550"/>
<a href="#">Mailing Labels</a>	Avery Mailing Labels.	Report Name <input type="text"/>
<a href="#">Client Extract</a>	A .txt file of clients eligible for reminder based on the report criteria. Includes omitted clients.	Report Name <input type="text"/>

NOTE: Fields marked with an asterisk \* are required.

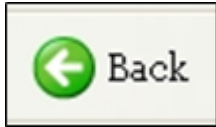
Free text will be added here and will appear at the bottom of the letter.

# Request Reminder Report

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
<a href="#">24-35 mos</a>	Reminder Letter	07/27/2009 05:57 PM	07/27/2009 05:57 PM	07/27/2009 05:57 PM	Ready

Report Link

# Request Reminder Report - Sample Reminder Letter



Dear Beth Quinn,

Our records indicate that Tester Testdelete, has received the following immunizations:

Immunizations History		
Immunization	Date Administered	Series
Influenza	11/12/2007	1 of 2
Influenza	12/17/2007	2 of 2
Influenza	11/10/2008	Booster

Our records also show that Tester may be due for the following immunizations. If Tester received these or other immunizations from another health care provider, please call our office so that we can update Tester's record. Otherwise please take Tester to a health care provider to receive them.

Vaccines Recommended by Selected Tracking Schedule	
Vaccine	Date Needed
HepB	01/10/2006
DTP/aP	03/10/2006
PneumoConjugate 7	03/10/2006
Polio	03/10/2006
Hib	03/10/2006
HepA	01/10/2007
MMR	01/10/2007
Varicella	01/10/2007
Influenza	11/10/2009
Meningo	01/10/2017

The number for our office is: 919-707-5550

Please make sure to bring any insurance information on your next visit

**Free text added**

# Request Reminder Report

Production Region 7.8.1

## General

system user manual

## Maintenance

manage users  
manage sites  
manage clinicians  
manage physicians  
manage schedules  
manage schools  
mass vax definition

## Inventory

manage inventory  
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request transaction sum  
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request wasted/expired  
inventory report

## Clients

manage client  
mass vax grid entry

## Immunizations

manage immunizations

## Reports

request reminder  
check reminder status  
request callback  
request new client form  
request casa extract  
check request status  
request vfc reports  
check vfc status  
assessment report  
check assessment

### Reminder Request Status

Started	Completed	Status	Clients	Eligible	Birth From	Birth To
<a href="#">07/27/2009 04:32 PM</a>	07/27/2009 04:33 PM	100 %	4	2	01/02/2006	01/01/2007

Refresh

Cancel

### Reminder Request Output Options

Output	Description	Additional Input
<a href="#">Client Query Listing</a>	A list of clients eligible for reminder based on the report criteria (in .pdf format). Excludes omitted clients.	Report Name <input type="text"/>
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text" value="Please make sure to bring any insurance information on your next visit"/> Phone # <input type="text" value="919-707-5550"/>
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text" value="Please make sure to bring any insurance information on your next visit"/> Phone # <input type="text" value="919-707-5550"/>
<a href="#">Mailing Labels</a>	Avery Mailing Labels.	Report Name <input type="text"/>
<a href="#">Client Extract</a>	A .txt file of clients eligible for reminder based on the report criteria. Includes omitted clients.	Report Name <input type="text"/>

NOTE: Fields marked with an asterisk \* are required.

Free text will be added here and will appear at the bottom of the card.

# Request Reminder Report Status

Production Region 7.8.1

## General

system user manual

## Maintenance

manage users  
manage sites  
manage clinicians  
manage physicians  
manage schedules  
manage schools  
mass vax definition

## Inventory

manage inventory  
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manage immunizations

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request reminder  
check reminder status  
request callback  
request new client form  
request casa extract  
check request status  
request vfc reports  
check vfc status  
assessment report  
check assessment

### Reminder Output Status

Name	Type	Requested	Started	Completed	Status
<a href="#">24-35 mos</a>	Reminder Card	07/27/2009 06:04 PM	07/27/2009 06:04 PM	07/27/2009 06:04 PM	Ready

Report is "ready"  
Click on link to view.

# Request Reminder Report Status - Sample of Reminder Card



Dear Beth Quinn,

Our records show that Tester Testdelete may be due for the following immunizations. If Tester received these or other immunizations from another health care provider, please call our office so that we can update Tester's record. Otherwise please schedule an appointment for Tester to receive them.

Vaccine Group	Date Needed
HepB	01/10/2006
DTP/aP	03/10/2006
PneumoConjugate 7	03/10/2006
Polio	03/10/2006
Hib	03/10/2006
HepA	01/10/2007
MMR	01/10/2007
Varicella	01/10/2007
Influenza	11/10/2009
Meningo	01/10/2017

Reminder card should be placed in an envelope to be HIPPA Compliant.



# Request Reminder Report Status – Mailing Labels

Production Region 7.8.1

## General

system user manual

## Maintenance

manage users  
manage sites  
manage clinicians  
manage physicians  
manage schedules  
manage schools  
mass vax definition

## Inventory

manage inventory  
manage orders  
manage transfers  
shipping documents  
request transaction sum  
request vaccine usage  
request wasted/expired  
inventory report

## Clients

manage client  
mass vax grid entry

## Immunizations

manage immunizations

## Reports

request reminder  
check reminder status  
request callback  
request new client form  
request casa extract  
check request status  
request vfc reports  
check vfc status  
assessment report  
check assessment

### Reminder Request Status

Started	Completed	Status	Clients	Eligible	Birth From	Birth To
07/27/2009 06:10 PM	07/27/2009 06:12 PM	100 %	12	10	12/02/2002	01/01/2009

Refresh

Cancel

### Reminder Request Output Options

Output	Description	Additional Input
<a href="#">Client Query Listing</a>	A list of clients eligible for reminder based on the report criteria (in .pdf format). Excludes omitted clients.	Report Name <input type="text"/>
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text" value="Please make sure to bring any insurance information on your next visit"/> Phone # <input type="text" value="919-707-5550"/>
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text" value="Please make sure to bring any insurance information on your next visit"/> Phone # <input type="text" value="919-707-5550"/>
<a href="#">Mailing Labels</a>	Avery Mailing Labels.	Report Name <input type="text"/>
<a href="#">Client Extract</a>	A .txt file of clients eligible for reminder based on the report criteria. Includes omitted clients.	Report Name <input type="text"/>

NOTE: Fields marked with an asterisk \* are required.

Mailing Labels can be generated using the Standard Avery labels.

# Request Reminder Report Status - View Report

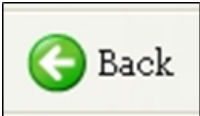
Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
<a href="#">0-72 mos</a>	Mailing Labels	07/27/2009 06:13 PM	07/27/2009 06:13 PM	07/27/2009 06:13 PM	Ready

Click on link to  
view report.



# Request Reminder Report Status - Sample Labels

## Mailing Labels



QUINN  
NANCY M FIRSTNAMETEST  
5601 SIX FORKS ROAD  
RALEIGH NC 27609

REMIND TEST  
REMIND TEST  
5  
RALEIGH NC 27609

MOMMA QUINN  
TESTCF TETSCL  
5601 SIX FORKS ROAD  
RALEIGH NC 27609

QUINN  
TEST ME  
5601 SIX FORKS ROAD  
RALEIGH NC 27609

PERSON TEST  
REMIND TEST  
5601 SIX FORKS ROAD  
RALEIGH NC 27609

BETH QUINN  
TEST THREE  
5601 SIX FORKS  
RALEIGH NC 27699

QUINN  
TEST ME  
5601 SIX FORKS ROAD  
RALEIGH NC 27609

BETH QUINN  
ROTAVIRUS TEST  
5601 SIX FORKS ROAD  
RALEIGH NC 27609

BETH QUINN  
TEST1 VFC  
5601 SIX FORKS ROAD  
RALEIGH NC 27609

ADAM NCIR  
ADAM NCIR  
ROAD  
RALEIGH NC 27609

QUINN  
ROTAVIRUS TEST  
5601 SIX FORKS ROAD  
RALEIGH NC 27609

Mailing Labels  
correspond  
with reminder  
cards and  
letters  
generated.

# Request Reminder Report

---

## How to get the Most From Reminder Recall

- Enter all children into the NCIR
- Enter historical immunizations (*properly and completely*)
- Check the '*Notices*' box for at least one responsible person

# Strategies for Improving Immunization Rates

---

- Prioritize vaccinations in terms of staff responsibilities and communication among ALL staff members
- Check immunization status at every visit
- Give all needed vaccinations at each visit
- Educate parents

## Strategies for Improving Immunization Rates Continued..

---

- Document any adverse reactions or contraindications to vaccines
- Consolidate immunization records
- Document attempted communication in patient record
- Inactivate clients that are no longer seen at your office or MOGE (moved or gone elsewhere)
- Schedule next visit before client leaves office
- Use Reminder/Recall

# Where to Go for More Help?



# Questions?

**Contact your Regional Immunization Program Consultant (RIC)**

The RIC Coverage Map with contact information is located on the Immunization Branch website:

<https://www.immunize.nc.gov/contacts.htm>

**NC Vaccines Help Desk**

1-877-873-6247

*(Monday – Friday 7:00 AM – 7:00 PM ET and Saturday 8:00 AM – 4:00 PM ET)*

[https://ncgov.servicenowservices.com/csm\\_vaccine?id=immunizations&sys\\_id=69f035b11b037c9099510f6fe54bcbee](https://ncgov.servicenowservices.com/csm_vaccine?id=immunizations&sys_id=69f035b11b037c9099510f6fe54bcbee)

# Appendix

# NCIR Roles

NCIR Role	Role Definition	Corollary Role in CVMS
<b>Reports Only</b>	This person in NCIR is only able to search for clients and view/print client specific records.	N/A
<b>Typical User</b>	Person who can manage, including add and edit, clients in NCIR, as well as manage inventory and ordering. This role also has all of the functionality of the Reports Only role.	Healthcare Provider
<b>Inventory Control</b>	Person who can manage inventory and ordering, as well as all of the functionality of the Typical user and Reports Only roles.	N/A
<b>Administrator</b>	Person who can manage organization users, sites, and clinicians in NCIR. They run practice-level reports, including reminder/recall. This role also has all of the functionality of the Reports Only, Typical User, and Inventory Control roles.	Location Manager